

European Golf Statistics 2017



Leading the Business of Golf

Photo by Aidan Bradley

Distribution of registered golfers over the last year:



Male golfers:

66%



Female golfers:

25%



Junior golfers:

9%

Total number of registered golfers:

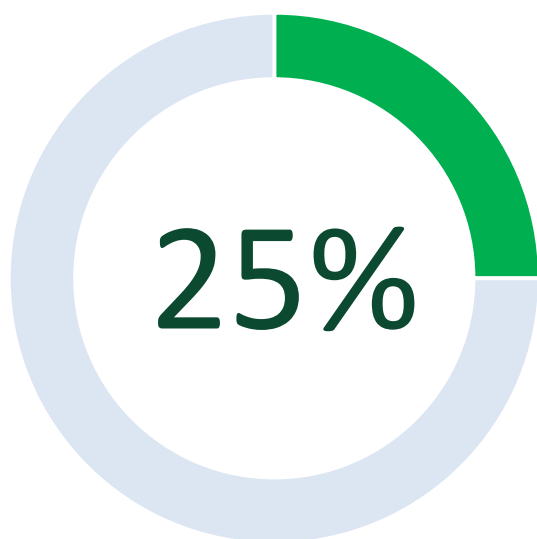
4,151,258

% change in participation of registered golfers in Europe:

-0.85%

Type of change in participation rated of registered golfers in Europe, 2016 (see methodology):

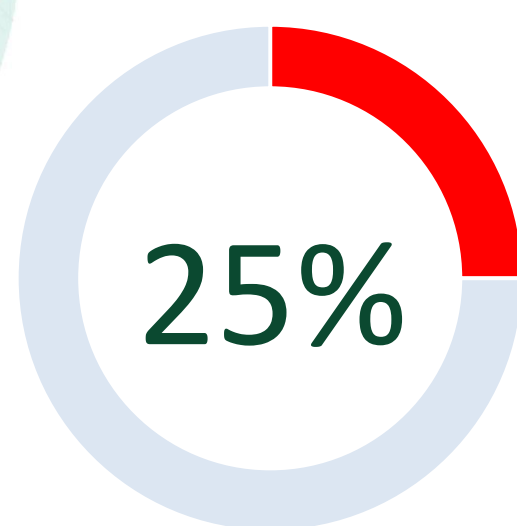
Countries with Growth



Countries with Stability



Countries with Decline



European Status:

Stable

-35,402 golfers since 2015
Or -0.92%



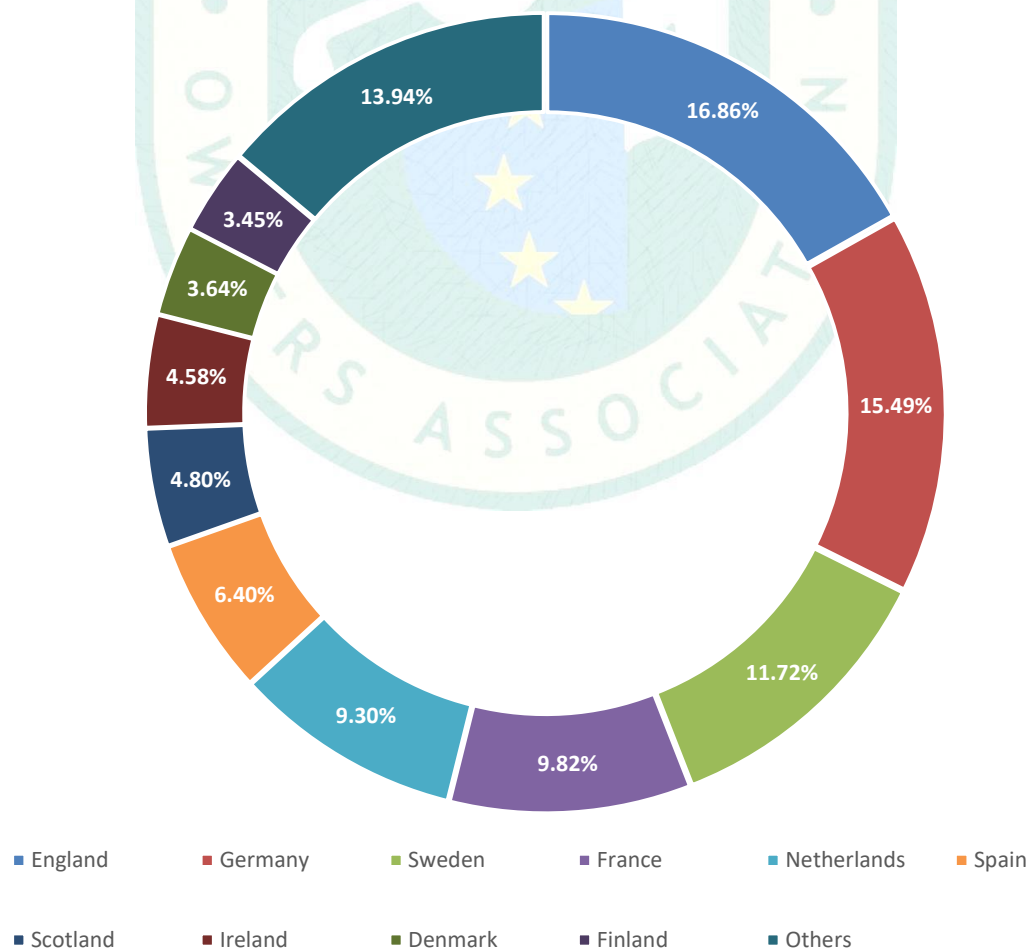
Europe's leading golf markets 2017

There are now over 4.15 million registered golfers across Europe with almost 7,000 standard length golf courses for them to play on.

Over 50% of the European market is based in the 5 most established golfing countries, namely England, Germany, Sweden, France and the Netherlands with the top 10 markets hosting 86% of the golfers.

England still holds the title of largest golfing nation, at 16.86% of the total. However, Germany is quickly catching up at 15.49%. It has seen consistent growth over the last 10 years, whilst the English market has been slowly contracting. It also has a much healthier proportion of both Juniors and Women, suggesting that it may not be long until it leads demand for golf in Europe.

Registered golfers: Top 10 by country 2016





Golf supply and demand trends in Europe

The golf market in Europe has had a tumultuous few years since hitting its peak in 2009 just after the global economic crash. Prior to this annual growth in demand had been stable at around 5% per year.

Between 2009 and 2015 participation fell by almost 5% across Europe. The past year, whilst still seeing a fall in participation, has seen a slow down in the trend, with a fall of just 0.95% compared to 1.75% the previous year.



Source: Local Golf Federations with EGCOA elaboration
See methodology for parameters of Growth, Stability and Decline

Our research has displayed considerable positive signs of demand in the golf market stabilising over the past year.

Approximately 25% of European Countries are seeing a noticeable decline in their demand compared to 33% last year.

This now means that 75% of the countries in Europe have seen their level of participation either stabilize or increased

over the last year.

Germany increased its growth 3 fold in the past year, adding over 4,000 new registered golfers, whilst Norway increased its total by over 6,000. Notable growth was also seen in Sweden, Switzerland and Belgium.

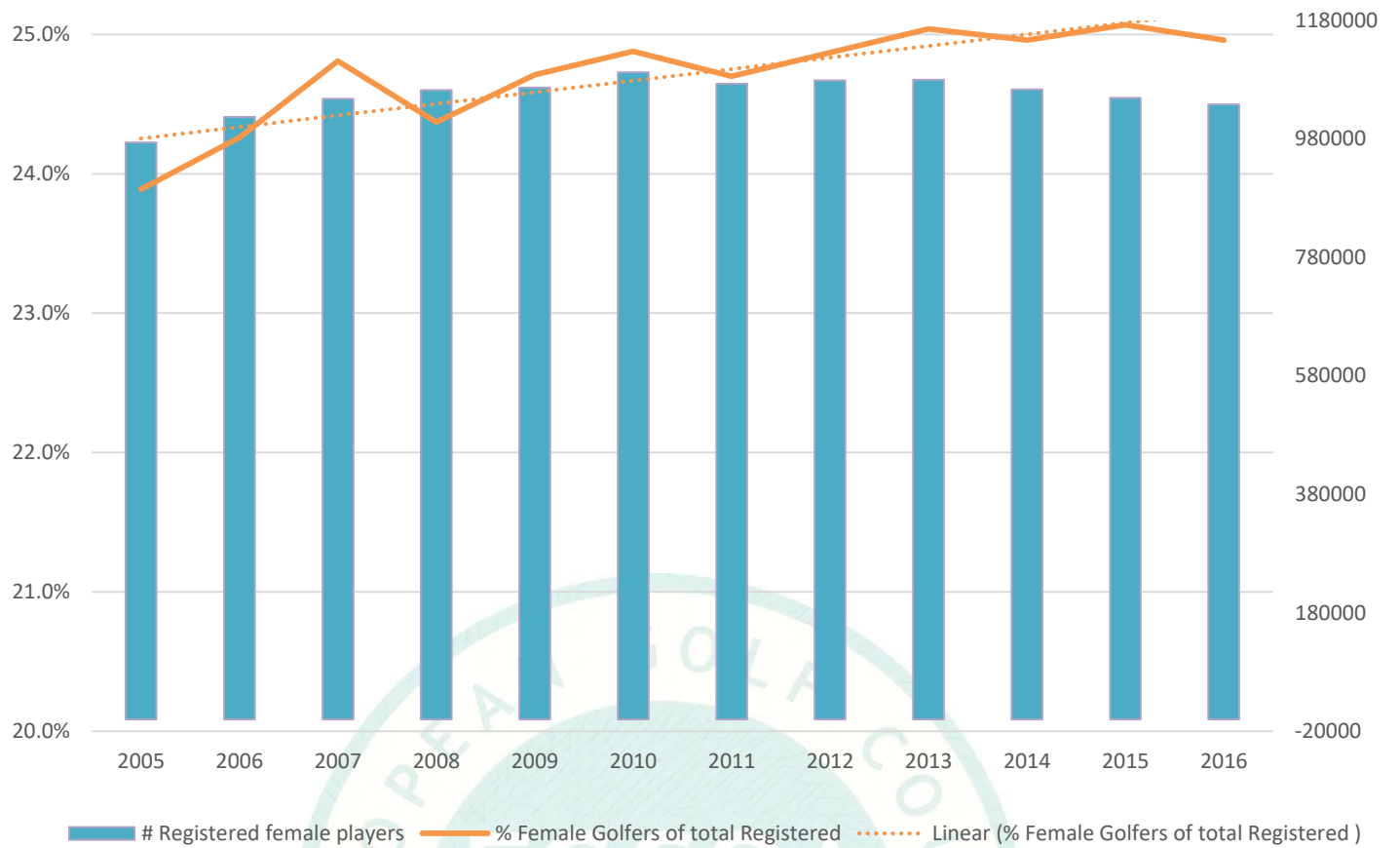
Of more concern is the state of participation in Spain, England and Wales that saw a decline in registrations in the last year. It must be stated that throughout the

UK the decline is starting to flatten, though it is hard to say whether it has yet bottomed out.

It should also be noted that information shared by local golf associations show that whilst golf membership has continued to become less attractive in these nations, many golfers are continuing to play as casual golfers on a green-fee basis.

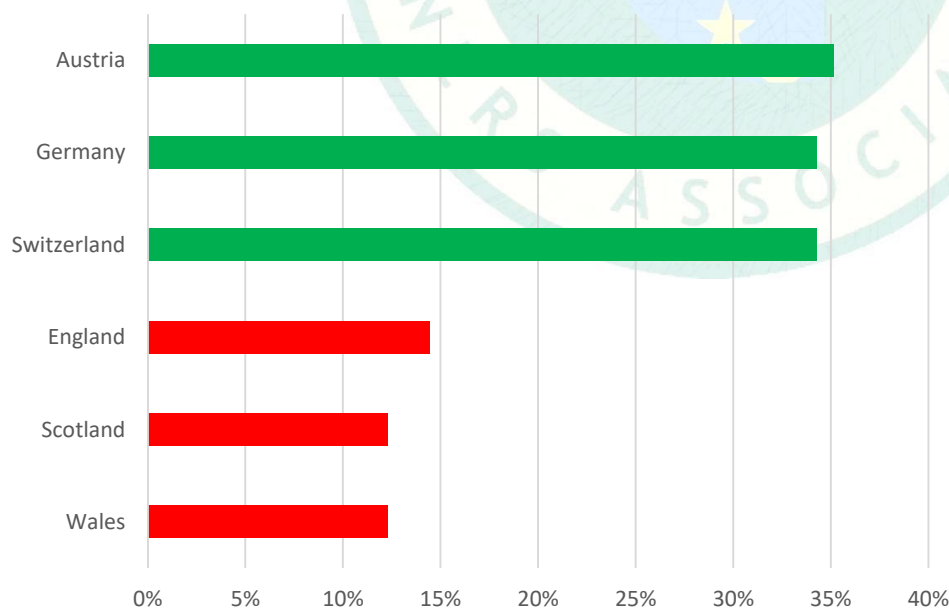


Female golf participation



The total number of female registered golfers in Europe has fallen over the last year by just under 13,000 over the past year. However, the percentage of women playing the sport has stayed somewhat similar when taken against the total number.

Best and worst three markets in terms of proportion of adult female golfers (compared to all golfers in the country) 2016

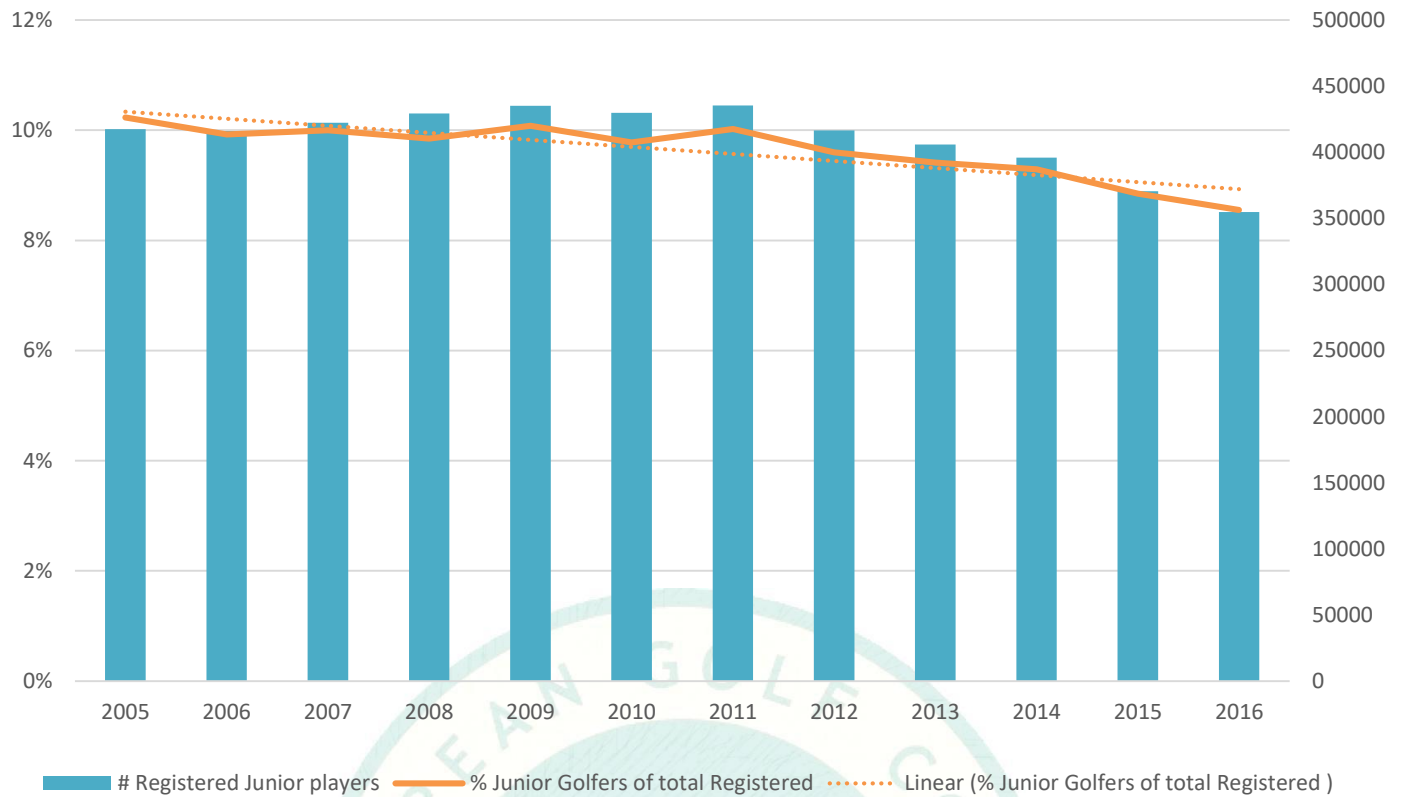


There is still a substantial difference in the make up of golfers across Europe. Austria, Germany and Switzerland (with the Netherlands in a close 4th) have continued to lead the way in female participation in golf.

Golf's traditional heartland is doing worse in regards to female participation, with all three countries in the UK not only seeing a reduction in total numbers but also in terms of proportion to the whole.

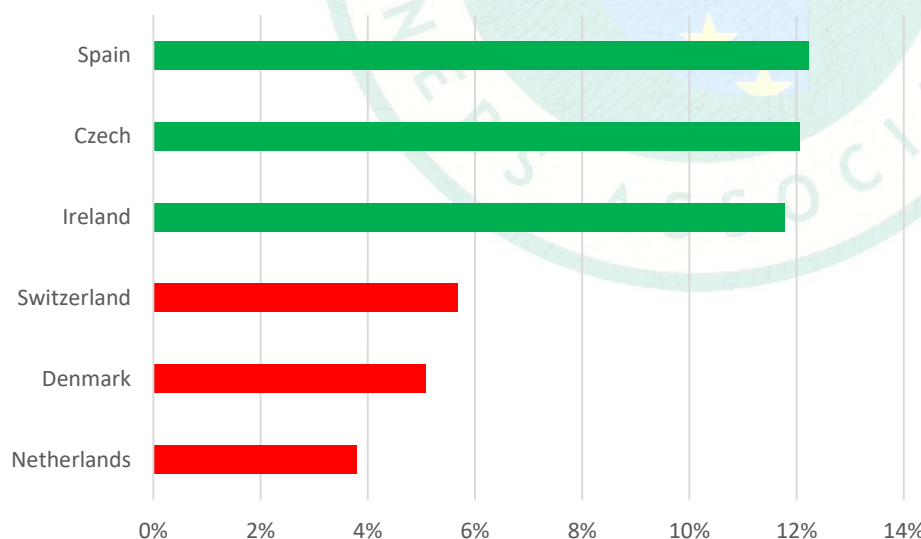


Junior golf participation



The total number of Junior registered golfers in Europe has fallen further over the last year by almost 16,000 over the past year. This has had a noticeably negative effect on the percentage of juniors within the registered golfing population, now standing at just 8.55%

Best and worst three markets in terms of proportion of Junior golfers (compared to all golfers in the country) 2016



Despite significant reductions in the total number of registered golfers, Spain has done the best in Europe at attracting Juniors proportionally in 2016. They are closely followed by Czechia and Ireland.

Switzerland, Denmark and the Netherlands, that all do extremely well in attracting female golfers, are falling behind when it comes to attracting juniors. Our research has suggested this is partly due to a more casual juniors program in these countries, as Switzerland was deemed to be growing and Denmark and the Netherlands were deemed Stable in this research.

Source: Local Golf Federations with EGCOA elaboration
See methodology for parameters of Growth, Stability and Decline



Methodology

All the data presented in this report is based on statistics gathered between January and December 2016. All figures are based on those in each country that represent themselves as registers golfers. This information was collected from the respective golf associations and federations in Europe in early 2016. All figured on demand refer to registered golfers as official statistics about the number of casual golfers are not readily available.

A stable rating has been defined as experiencing a change in its total number of registered golfers between -1% and +1% year on year from 2015 to 2016.

For further information or to request the data set, please email office@egcoa.eu